

TOWN OF WELLESLEY



MASSACHUSETTS

## CONTRIBUTORY RETIREMENT SYSTEM

TOWN HALL • 525 WASHINGTON STREET • WELLESLEY, MA 02482-5992

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RETIREMENT@WELLESLEYMA.GOV  
LYNN WHYNOT  
RETIREMENT ADMINISTRATOR

TO: Inactive Member  
FROM: Lynn Whynot, Retirement Administrator  
RE: Application to Withdraw Funds

If you wish to withdraw your accumulated deductions from the Wellesley Contributory Retirement System, please read this memo and return the withdrawal application and forms described below to the Wellesley Retirement Office. The retirement system will send your lump sum within 60 days from the date we receive the complete application. If information is missing from the application it is considered incomplete and we cannot process the refund or rollover until all information is received.

1. Refund Application. This form contains information regarding pension law changes effective April 2, 2012. Please initial the bottom and return this page.
2. Refund/Rollover Request Form. Please check all the boxes that apply. This page must be notarized if returning the application by mail. Alternatively, you may schedule a time to drop it off at the Retirement Office and show proper identification.
3. Application for Withdrawal. Please fill out Section A (pages 1-3) completely. On page 2, where it says Method of Payment, indicate if you want a refund or a rollover. If you are choosing a rollover, please put down where the funds should be sent on the bottom of this page along with the address of the company and the account number. **Please note on page 3, under Member & Witness Signature Block, you must sign and date the form and have a witness sign and date the application.**
4. Special Tax Notice. This form is informational for you to keep. You do not need to return this notice.

Please return the completed application to the following address:  
Wellesley Retirement System  
525 Washington Street  
Town Hall  
Wellesley, MA 02482

If you have any questions or concerns, please contact the Wellesley Retirement Office at 781-431-1019 ext. 2216 or 2217 or [retirement@wellesleyma.gov](mailto:retirement@wellesleyma.gov).